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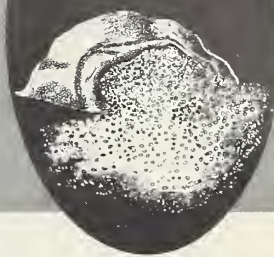
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# FOREIGN AGRICULTURE CIRCULAR

U.S. DEPARTMENT OF AGRICULTURE  
Foreign Agricultural Service Washington D.C.

SEEDS



SEEDS  
FFVS 4-57  
December 2, 1957

## WEST GERMAN 1956-57 SEED PRICE LEVEL

### INCREASES IMPORT VALUE

#### Summary

The value of West German imports of forage, vegetable, flower and forestry seeds increased from about \$12.4 million during July 1955 through May 1956, to about \$16.4 million in the corresponding period of 1956-57. The rise was due largely to price increases, especially in the case of red clover seed. The domestic price of seeds fluctuated from a peak in the fall of 1956 to a relatively low level in the spring and summer of 1957.

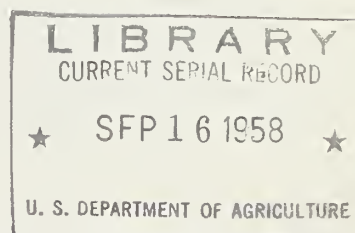
Imports from the United States rose by 11 percent to approximately \$2 million.

The carryover of grass and legume seeds into the 1957-58 season was very small. The outlook for the 1957 production of forage, vegetable and flower seeds is good. The over-all demand for imports is not expected to change substantially from that of last year.

Alsike clover and redtop seed were removed from the general license list for importation from the United States and Canada on May 25, 1957. This did not affect imports from these countries since a dollar import tender was published on June 21, 1957.

#### General Market Situation

Forage seeds: During the past crop year, West German wholesale prices for grass and legume seeds fluctuated widely. At the beginning of the 1956-57 season there were reports by domestic and some important foreign production centers that seed production was very low and in some cases a complete failure due to winter kills and a cold, wet summer. These reports stimulated prices, so much that during September 1956 wholesale prices reached a long-term peak. During the subsequent months, however, production moved higher



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than expected and wholesale prices dropped throughout the winter, reaching a comparatively low level during the spring.

In former years the wholesalers during the fall months contracted for approximately 50 percent of the retailers' annual seed requirements for future delivery. During the past autumn the retailers, wary of the market, contracted for only small quantities for future delivery and relied upon spot purchases for obtaining stocks as needed.

The seed business, therefore, was very speculative, and, while some individual wholesale traders earned high profits, others suffered severe losses. Because of the forecast of high international production of agricultural seeds, prices for the 1957-58 crop year are expected to continue relatively low.

The 1957 German seed production is expected to be considerably higher than in 1956. The propagation areas were extended for several field seeds and the weather in general has been good. The clover seed harvest and the yield of timothy seed are expected to be good, with the quality dependent upon weather conditions. Only about 40 percent of a normal crop of Italian ryegrass seed will be harvested since sizable areas were plowed under to prevent too large stocks.

Carryover of forage seeds is of little importance.

Vegetable and Flower seeds: The West German requirements of vegetable seeds increased considerably during 1957 as compared with the two preceding seasons. Requirements for flower seeds also increased. Favorable weather conditions, higher incomes and shorter working hours were contributing factors and probably will continue to stimulate the demand for vegetable and flower seeds during the next few years.

At the beginning of the 1957 calendar year the cultivation area of early vegetables was reported to have been extended by at least 10 percent. The increase was chiefly in early Kohlrabi varieties, early spinach, head lettuce, red cabbage, cauliflower, and carrots.

Almost all stocks of vegetable seeds were sold with the over-all 1957 vegetable seed crop forecast to be normal.

The 1956 flower seed harvest was low in quantity with poor germination. A normal yield is expected from the 1957 crop and should supply sufficient quantities of next year's requirements.

The market supply of seeds from perennial shrubs was very scarce. In some cases such seeds were almost unavailable except for *adonis vernalis*, *alyssum saxatile*, *anemone de caen*, *arabia*, *carastium*, and *gaillardia*.

At the beginning of May 1957 stocks in trade channels of almost all perennial flower seeds for the summer season were exhausted.



### Foreign Trade

From June 1956 through May 1957 the total value of West German imports of forage, vegetable, flower and forestry seeds increased over the corresponding 1955-56 period. The tonnage supplied by foreign countries did not show a corresponding increase in all cases.

During the 1956-57 crop year, France was West Germany's principal supplier of grass and legume seeds, shipping more than one-fourth of the total value. France was the largest individual source of red clover seed (\$2,023 thousand) and alfalfa seed (\$738 thousand). These two seeds accounted for about 89 percent of the value, approximately \$3 million, of the 1956-57 French grass and legume seed exports to West Germany.

Denmark exported the next largest amount, \$1,856 thousand, or 16 percent of West Germany's total grass and clover seed imports. Denmark was the principal supplier of perennial ryegrass seed (\$524 thousand), meadow fescue, red fescue, Kentucky bluegrass, rough bluegrass, meadow grass, and the second largest supplier of white clover (\$333 thousand).

During the period July 1956-June 1957, approximately \$2 million of West Germany's imports of forage, vegetable, flower and forestry seeds came from the United States. Compared with the previous year, United States shipments to West Germany rose 11 percent, though the share in the total supply fell slightly, from 14 to 12 percent. The United States and Canada combined were third in importance among foreign suppliers of grass and legume seeds, on the basis of value, shipping 10 percent of the legume seed, and 20 percent of grass seed imports. Both countries were major exporters (91 percent) of alsike clover seed to West Germany. Shipments were valued at \$286 thousand. They also supplied \$214 thousand worth of timothy and \$119 thousand worth of redtop seeds. The timothy seed amounted to 82 percent and redtop seed 99 percent of the total supplies of those seeds. In addition, the United States shipped nearly 75 percent of the seed corn and continued as the principal supplier of forestry seeds.

During the 1956-57 crop year West Germany imported nearly 24.5 million pounds of legume seed at a value of \$9.8 million. The slight decrease from the previous year was mainly in red clover, alfalfa, alsike clover, black medic, and other legume seeds. Exports of legume seeds also declined, mainly red clover, with alfalfa and crimson clover showing slight increases.

Although the 1956 production of red clover seed was very low, imports dropped during the past year, the seed requirements were met with a large carryover. The sharp increase in the import value from about \$3.6 million to \$6.0 million reveals the considerable price increases on the international market. For this reason, the West German import trade kept very small carryover stocks.

West Germany remained the principal market for the French red clover seed surplus even though the amount decreased from 69 percent of the total tonnage imported the previous year to 39 percent in 1956-57. Italy, the second

largest supplier, increased its shipments as did the southeast European countries.

Alfalfa was the second largest of the group of imported legume seeds, amounting to \$1.5 million in value. The tonnage increased by 11 percent. France remained the principal source of alfalfa, although shipments declined. The United States and Canada were second in importance.

An import tender for the United States, issued November 8, 1956, licensed importation of Blue Tag Atlantic, Narragansett, Grimm and Ranger certified alfalfa seeds.

Switzerland shipped mainly Turkish Kayseri alfalfa seed which in several field trials proved well suited to German conditions. The carryover is assumed to have been seeds mainly of U.S. origin, and only some French seed.

White clover imports which reached a long-time high came mostly from Hungary, Denmark, the United States and Canada. According to the trade, Denmark demanded very high prices for Morsoe white clover during the fall of 1956, because they expected large U.S. purchases. When the latter did not materialize and the Danes sought a German outlet, they met with competition from Hungary which outpriced them. Consequently, the price quotations were much lower in the spring than during the winter and fall months.

West German purchases of alsike clover seed were lower than during the 3 preceding years, even though production was small. This may have been due in part to the deliberalization of alsike and redtop seeds or to other factors.

Grass seeds: Imports of grass seeds increased in the past crop year, mainly in perennial ryegrass, tall oat grass, meadow fescue, red fescue, and redtop. Exports of grass seeds, mostly Italian ryegrass, decreased.

Perennial ryegrass seed imports accounted for 35 percent of the total import value; imports from Denmark amounted to 71 percent of the total tonnage and the United Kingdom 19 percent. Import requirements are expected to be high for the current crop year. Italian ryegrass is not licensed for importation and only certified domestic seed is admitted to the market, since the German products meet the farmers' needs.

The second largest import of grass seeds was timothy, with the United States and Canada supplying 82 percent of the total import value. However, seeds from Sweden and Finland are reportedly more suitable. Consequently, the Ministry may not issue an import tender for timothy seeds from the United States and Canada this year. C.i.f. prices for U.S. timothy were about \$18.35 per 100 pounds last year; Swedish prices were about \$23.75 per 100 pounds.

Other grass seeds imported in small amounts were red fescue, meadow fescue, and redtop.

Seed Corn: During the past two crop years, the United States remained the principal supplier of seed corn, and Hungary the second largest supplier.



West German exports amounted to about 2,750 thousand pounds, with nearly the entire tonnage going to Czechoslovakia.

**Legislation:** The Anti-Cartel Law, which is the law against restriction on competition, will become effective on January 1, 1958. According to this Law, producer associations or enterprises can bind the purchasers of their seeds legally or economically to sell their seeds at certain fixed prices. Furthermore, they can fix seed prices through all trade channels until the seeds reach the consumer. Producers can also bind themselves to offer the individual seeds at uniform prices.

Foundation seed, registered, certified, commercial and admitted import seeds are all subject to this law. The price control cannot be applied for certain vegetable seeds, all flower seeds, and seeds for non-agricultural purposes.

Subsidies amounting to nearly \$700,000 have been furnished to encourage seed breeding and propagation.

Seeds, Selected: Imports by total value by the Federal  
Republic of Germany, and United States share,  
July-May 1955-56 and 1956-57

Kind of Seed	11 months beginning July							
	Value						U. S. Percent of Total	
	Total		U. S. Origin					
	1955	1956	1955	1956	1955	1956		
	<u>dollars</u>	<u>dollars</u>	<u>dollars</u>	<u>dollars</u>	<u>Percent</u>	<u>Percent</u>		
Clover, Red	3,509	5,970	15	11	0	0		
Legumes, Other	3,002	4,075	517	833	17	20		
Grass & Other	1,752	2,044	228	307	13	15		
Corn	968	849	710	635	73	75		
Vetch & Lupine	927	1,238	48	9	5	1		
Vegetable	1,438	1,616	82	75	6	5		
Flower	506	506	18	23	4	5		
Forestry	229	160	163	88	71	55		
Total	12,331	16,458	1,781	1,981	14	12		

Forage seeds: Imports by Federal Republic of Germany,  
crop years 1950-51 through 1956-57

Kind of Seed	1950	1951	1952	1953	1954	1955	1956
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
<u>Legumes:</u>							
Alfalfa	3,111	97	2,429	3,142	3,796	4,444	3,968
Clover, Red	6,658	8,818	11,404	12,359	14,361	14,297	13,600
Clover, White	873	983	1,232	1,431	1,365	1,318	1,905
Clover, Alsike	163	534	906	1,695	1,305	1,378	1,001
Clover, Crimson	470	1,122	2,498	2,416	1,484	858	1,005
Black Medic	430	494	765	487	284	719	419
Birdsfoot trefoil	238	216	126	428	106	333	313
Other	2,905	4,736	292	2,059	2,024	2,357	2,242
<u>Grasses:</u>							
Timothy	1,171	703	549	755	1,184	1,380	1,415
Ryegrass, Perennial	4,665	2,723	4,467	8,080	9,416	6,221	6,007
Ryegrass, Other	4,813	0	337	359	2,108	423	322
Fescue, Meadow	456	0	300	988	1,713	315	768
Fescue, Red	84	2	13	276	1,047	0	582
Bluegrass, Kentucky	639	406	157	57	478	496	280
Bluegrass, Danish	159	139	79	203	245	362	379
Grass, Orchard	71	84	26	126	154	77	66
Other	8	41	245	293	895	456	1,012
<u>Other Forage:</u>							
Vetch, Hairy	322	485	1,358	1,107	919	955	946
Vetch, Common	9,127	7,740	12,721	18,155	4,643	3,371	7,954
Field pea	7,747	143	2,965	3,322	1,351	0	675
Spurry	37	79	128	196	381	66	71
Lupine	2,551	8,781	5,990	8,523	6,464	10,831	9,828
Seed Corn	12,996	10,265	8,472	13,554	15,739	17,952	11,936



Seed Corn: Imports by Federal Republic of Germany  
by country of origin and value, 1956-57

Country of Origin	Amount	Value
	1,000	1,000
	<u>pounds</u>	<u>dollars</u>
Austria	1,166	81
Hungary	1,605	98
Italy	33	2
Netherlands	51	9
Portugal	207	12
United States/Canada	8,871	577
Total	11,933	779

Grass and Legume Seeds: Federal Republic of Germany's  
principal suppliers, by country of origin, 1956-57

Country of Origin	Value	Percent of total
	1,000	
	<u>dollars</u>	<u>Percent</u>
France	3,089	26
Denmark	1,857	16
United States/Canada	1,442	12
Hungary	1,321	11
Italy	1,046	9
Yugoslavia	727	6
United Kingdom	598	5
Belgium-Luxembourg	586	5
Czechoslovakia	401	3
Netherlands	290	2
Other	561	5
Total	11,918	100

Forage Seeds: Imports by Federal Republic of Germany, by  
country of origin, crop years 1950-51 through 1956-57

Item and Country of Origin	1950	1951	1952	1953	1954	1955	1956
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds	pounds
<u>Alfalfa:</u>							
France	2,606	15	1,495	1,554	547	2,870	1,532
Italy	452	82	600	150	351	172	439
Netherlands			4	1,292	53	209	148
United States/Canada				139	2,840	1,177	1,235
Other	44		330	11	4	17	613
Total	3,102	97	2,429	3,146	3,795	4,445	3,967
<u>Clover, Red:</u>							
Belgium-Luxembourg	168	247	364	139	37	1,321	1,157
Czechoslovakia	143	417	904	44	373	141	624
France	595	3,503	4,650	9,586	4,072	9,828	5,258
United Kingdom	2,425	328	2,030	128	551	2,352	1,076
United States/Canada					2,127		
Other	3,523	4,328	3,456	2,462	7,203	655	5,485
Total	6,854	8,823	11,404	12,359	14,363	14,297	13,600
<u>Clover, Alsike:</u>							
France		254	2		46		22
United Kingdom		26	351		44	161	
Netherlands			60	121	90	24	4
Sweden	154	181			90		
United States/Canada			456	1,574	1,113	1,193	906
Other	11	73	35		13		88
Total	165	534	904	1,695	1,396	1,378	1,020
<u>Other Legumes:</u>							
Belgium-Luxembourg	82		15	11	44	11	22
Denmark	600	1,122	564	481	117	995	919
France	1,451	1,292	1,680	2,163	1,825	639	505
United Kingdom	412	170	829	644	302	553	58
Hungary	22	22	866	187	410	525	1,367
New Zealand		106	220	251	592	60	26
Poland	1,649	392		690	49	1,601	465
United States/Canada					388	209	597
Other	136	20	605	242	1,531	713	547
Total	4,352	3,124	4,779	4,669	5,258	5,306	4,506

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(Continued from Page 8)

Forage Seeds: Imports by Federal Republic of Germany, by  
country of origin, crop years 1950-51 through 1956-57

Item and Country of Origin	1950	1951	1952	1953	1954	1955	1956
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds	pounds
<u>Ryegrass, Perennial:</u>							
Denmark	2,844	1,653	2,044	2,928	926	4,888	4,727
United Kingdom	2,006	1,071	2,423	2,064	2,480	897	1,294
Ireland				1,413	1,303	437	646
Netherlands					772		
New Zealand				1,519			
United States/Canada					3,898		
Other				156	35		
Total	4,850	2,724	4,467	8,080	9,414	6,222	6,667
<u>Timothy:</u>							
France	342						
Sweden	128	225	414	897	262	33	170
United States/Canada	732	478	42		869	1,285	1,190
Other			93	58	53	62	55
Total	1,202	703	549	955	1,184	1,380	1,415
<u>Other Grasses:</u>							
Denmark	926	448	932	1,215	2,632	939	1,951
France	158		53	123	229	156	121
United Kingdom	2		9	108	22	174	46
Netherlands				396	1,663	66	79
United States/Canada	948	672	134		932	55	280
Other			14	404	891	45	161
Total	2,034	1,120	1,142	2,246	6,369	1,435	2,638

Grass and Legume Seeds: Federal Republic of Germany's  
total imports from each country, and selected seeds  
as percent of total from each country, 1956-57

Country of Origin	Total Imports	Percent of total				
		Perennial Ryegrass	Alsike Clover	Red Clover	Timothy	Alfalfa
	1,000					
	pounds	Percent	Percent	Percent	Percent	Percent
Denmark	8,549	55		6		
France	7,438			71		20
United States/Canada	4,259		21		28	29
Hungary	2,858		2	46		2
United Kingdom	2,522	52	1	43		
Yugoslavia	1,761			83		
Belgium-Luxembourg	1,157			100		
Czechoslovakia	750			83	1	
Ireland	668	97		3		
Netherlands	591			40		25
Switzerland	564					100
Poland	465					
Italy	461					95
New Zealand	337			100		
Sweden	172				99	
Other 2/	1,690					

1/ Other legumes. 2/ Contains small amounts from other countries but mostly unspecified small deliveries.



Seed Corn: Imports by Federal Republic of Germany,  
maturity group and country of origin, 1956-57

Variety	Amount	Maturity Group	Country of Delivery
	1,000		
	<u>pounds</u>		
Keystone 5	1,323	Very late	United States
A.H.P.	1,279	" "	" "
Jowealth 90	1,146	" "	" "
Foddermaker E	1,146	" "	" "
Stockmann 95	705	" "	" "
Jacques 1003J	705	" "	" "
Pioneer, mainly 377A:	694	" "	" "
Warwick W303	66	" "	" "
Mo. 5	132	" "	Hungary
Hybrid Seed Corn	7,196		
U22	1,102	Middle late	United States
Jacques 802J, 8537	331	" "	" "
Wisconsin	331	" "	" "
Hybrid Seed Corn	1,764		
Wisconsin 355A	287	Early	Austria
CJV	71	"	Netherlands
Kingscrost	22	"	United States
Hybrid Seed Corn	380		
Seed Corn	1,495	Very late	Hungary
Seed Corn	522	Late & very late	Austria
Seed Corn	2,017		
Total	11,357		

Seed Prices: Federal Republic of Germany, C.i.f. Hamburg,  
or Free Border, end of August, 1957

Kind of Seed	Country of Origin	Price Per 100 Pounds
		<u>Dollars</u>
Clover, Red	South France	21.05
Clover, Red	North France	22.67
Clover, Red	England	26.04
Clover, Red	Denmark	32.19
Clover, White	Denmark (Morsoe)	31.53
Clover, White	United States (Ladino)	30.00
Black Medic	Denmark	17.74
Clover, Alsike	Canada	19.00
Alfalfa	France (Provence)	80.00
Alfalfa	France (North Centre)	77.00
Alfalfa	France (Flamande)	84.00
Clover, Crimson	Yugoslavia	11.55
Ryegrass, Perennial	Denmark	6.44
Bluegrass, Kentucky	Denmark	39.41
Bluegrass, Danish	Denmark	23.32
Fescue, Meadow	Denmark	11.82
Fescue, Red	Denmark	25.82
Meadow Grass	Denmark	12.48
Timothy	Canada	10.50
Highland Bent Grass	United States	21.00

Seeds: Wholesale prices in Federal Republic of Germany,  
August 1956 and 1957

Kind of Seed	Origin	% Purity/Germi- nation	Time of Delivery	Place of Delivery	Price per 100-pounds	
					1957	1956
		Percent			Dollars	Dollars
Red Clover	France, South	97/90	Nov/Jan	Kehl	23.75	47.50
Red Clover	France, North	97/90	Nov/Jan	Kehl	24.83	57.22
Red Clover	England	98/88	Oct/Dec	Hamburg	28.07	56.14
Berseem Clover	Italy	97/85	Oct/Jan	Kufstein	19.97	41.56
Ladino Clover	United States	97/90	Nov/Jan	Hamburg	32.93	58.84
White Clover	Denmark (Morsoe)	97/90	Dec/Jan	Hamburg	34.55	81.51
Alsike Clover	Canada	98/90	Nov/Jan	Hamburg	23.75	41.56
Alfalfa	North Centre (Fr.)	97/88	Nov/Jan	Kehl	37.78	49.66
Alfalfa	Provence (France)	97/90	Nov/Jan	Kehl	38.86	50.74
Alfalfa	Provence (France)	97/88	Winter	Juelich	41.24	N.A.
Alfalfa	U.S. (Atlantic					
	Blue Tag)	98/92	Winter	Juelich	36.17	N.A.
Alfalfa	U.S. (Ranger Blue:					
	Tag)	98/92	Winter	Juelich	35.63	N.A.
Black Medic	Denmark	98/90	Nov/Jan	Hamburg	21.81	38.86
Crimson Clover	Yugoslavia	97/82	Spot	Hannover	13.71	29.15
Perennial Ryegrass	Denmark	97/95	Jan/Feb	Hamburg	9.18	15.33
Timothy	Canada	98/88	Nov/Jan	Hamburg	15.11	27.20
Meadow Grass	Denmark	90/95	Jan/Feb	Hamburg	15.65	33.36
Danish Bluegrass	Denmark	90/90	Nov/Jan	Hamburg	26.99	44.80
Kentucky Bluegrass	Denmark	85/85	Nov/Jan	Hamburg	49.12	83.13
Highland Bentgrass	U.S. (1957)	98/85	Dec/Feb	Hamburg	29.69	59.38
Highland Bentgrass	U.S. (1956)	99/86	Spot	Hamburg	32.93	-
Italian Ryegrass	Germany (Domestic:					
	certified)	97/90	Oct/Nov	Rheinland	9.72	13.82
Meadow Fescue	Germany (Domestic:					
	certified)	97/90	Sept	Hannover	25.91	28.07
Red Fescue	Germany (Domestic:					
	certified)	97/90	Oct/Nov	Hannover	39.94	43.18
Seed Corn	U.S. (hybrid)	99/95	Spot	Juelich	8.64	N.A.
Seed Corn	Hungary (Yellow)	99/95	Spot	Juelich	7.88	N.A.
Seed Corn	Austria					
	(Loosdorfer)	99/95	Spot	Juelich	7.88	N.A.

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